

<b>DOD: 04/05/03</b>	<b>EDWARD L. MYERS, JR. and MONIQUE M. HUTCHINGS</b> , were appointed as Co-Administrator's with Will Annexed on 08/19/03.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>CONTINUED FROM 02/10/15</b> <b>Minute Order from 02/10/15 states:</b> Counsel represents that the eviction process was initiated last week; the Court will allow 60 more days. If the petition is not filed, a status report, verified by the Administrator, is required to be filed at least 2 court days prior to the hearing.  <b>As of 04/08/15, nothing further has been filed in this matter.</b>  1. Status Report filed 02/05/15 is unverified by the Administrator.  <b>Note:</b> Proof of service attached to the Status Report filed 02/05/15 is not filled out and not signed.
<b>Cont. from 021015</b>	<b>Letters of Administration with Will Annexed</b> were issued on 08/19/13.	
<b>Aff.Sub.Wit.</b>	<b>Inventory &amp; Appraisal</b> , partial No. 1 filed 04/08/04 - \$707,312.97	
<b>Verified</b>	<b>Inventory &amp; Appraisal</b> , final filed 04/21/04 - \$16,968.64	
<b>Inventory</b>	<b>Inventory &amp; Appraisal</b> , partial No. 1 corrected filed 11/10/04 - \$877,312.97	
<b>PTC</b>	<b>Petition for Preliminary Distribution and Statutory Fees</b> filed 03/16/05 was granted on 06/02/05.	
<b>Not.Cred.</b>	<b>Ex Parte Petition for Amended Letters</b> granted 05/30/13 ordered that Monique M. Hutchings is the sole Administrator following the death of Edward L. Myers, Jr. <b>and set this matter for status.</b>	
<b>Notice of Hrg</b>	<b>Amended Letters of Administration with Will Annexed</b> were issued on 06/05/13.	
<b>Aff.Mail</b>	<b>Minute Order from Probate Status Hearing Re: Failure to File a Final Account or Petition for Final Distribution</b> held on 01/09/15 set this matter for an Order to Show Cause and states: There are no appearances in this matter. The Court issues an Order to Show Cause as to why the Co- Administrators should not be removed for failure to file the Final Account or Petition for Final Distribution. Mr. Sullivan and the Co- Administrators are each ordered to be personally present in court on 02/10/15.	
<b>Aff.Pub.</b>	<b>Clerk's Certificate of Mailing</b> attached to the Minute Order indicates that a copy of the Minute Order was mailed to Robert Sullivan on 01/09/15.	
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 04/08/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 1 - Myers</b>

**Status Report filed 02/05/15 states:** most of the property was distributed to the beneficiaries in a preliminary distribution by order of this Court on 06/02/05. The estate contains a bank account with a balance of \$152,980.00 at this time. The Court also allowed the Co-Administrators to form an LLC to hold the remaining assets of the estate, namely, four parcels of environmentally contaminated real property. Pursuant to the Court's order, the Elm & Church, LLC was formed and currently holds a bank account with a balance of \$50,000.00 as well as the four parcels of real property. At the time of decedent's death, an environmental contamination problem related to previously installed underground fuel storage tanks had been discovered and was in the process of being analyzed and remediated by the Decedent utilizing Krazan & Associates ("Krazan").

Krazan determined the existence of contamination from the underground fuel storage tanks and enrolled the property in the State of California Environmental Cleanup Fund, which reimburses property owners for expenses incurred in the identification, analysis and remediation of underground storage tank contamination. Remediation efforts on the property has been ongoing.

During the administration of the estate, Krazan determined the nature and extent of the environmental contamination and commenced procedures for the remediation of the contamination discovered. All expenses incurred by the estate in connection with the valuation and remediation of the contamination have been reimbursed by the State of California.

As reported in the Petition for Preliminary Distribution filed 03/16/05, the estate's membership interest in the LLC would continue to be held in the estate pending final resolution of the environmental concerns, since distribution of the LLC membership interest to the beneficiaries could expose the beneficiaries to the potential for individual liability, or actual individual liability. In her last status report, the Administrator reported that she thought the remediation could be completed within 3 to 4 months. However, the California Regional Water Quality Control Board – Central Valley Region ("RWQCB"), after inspection of the Property, refused to qualify the case for closure and did not provide a closing letter. The RWQCB instead requested further remediation as well as a study to determine whether current concentrations of petroleum hydrocarbon constituents ("PHCs") on the property pose a threat to human health. The Administrator asked Krazan to provide remediation proposal to the RWQCB, which it did on 02/28/14. The RWQCB has issued a statement that "case closure may be appropriate" for the property. It issued a "Preclosure Public Notification" on 05/21/14, which stated that a "Public Notice" proposing the site closure would be mailed to certain interested parties. The Notification stated that the case would be open for public comment until July 20, 2014. Upon completion of the public comment period, and in the absence of substantive comments against closure, the RWQCB will perform a closure inspection of the Property and issue a case closure letter.

No comments were received from the public and the RWQCB issued a letter to Monique Hutchings stating that the wells on the property should be destroyed and the site should be restored before a closure inspection by the RWQCB would occur and a closing letter would thereafter issue. The closing letter finally issued from RWQCB on 10/13/14 and Monique Hutchings proceeded to put the property up for sale.

Administrator found a buyer for a portion of the property and that buyer is in the process of borrowing the funds necessary to purchase the rest of the property. However, the tenant currently on the property is seriously delinquent on his rent and Administrator is now beginning eviction proceedings against him. The property should not be distributed while eviction proceedings are proceeding and part of the property is left unsold. Therefore a 2 month continuance is requested in order to allow time to facilitate a sale of the property and prepare and file the Petition for Final Distribution.

## Petition for Letters of Special Administration without General Powers

<b>Age:</b>			<b>NEEDS/PROBLEMS/COMMENTS:</b>  <div style="text-align: center;"><b><u>OFF CALENDAR</u></b></div> <b>Order Appointing Special Administrator was signed ex parte on 3/5/15 and will expire 6/15/15.</b>
<b>DOD:</b>			
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Verified</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Inventory</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>PTC</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Not.Cred.</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Notice of Hrg</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Aff.Mail</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Aff.Pub.</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Sp.Ntc.</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Pers.Serv.</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Conf. Screen</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Letters</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Duties/Supp</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Objections</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Video Receipt</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>CI Report</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>9202</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Order</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Aff. Posting</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Status Rpt</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>UCCJEA</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Citation</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>FTB Notice</b>	<input type="checkbox"/>	
<b>Reviewed by:</b> skc			
<b>Reviewed on:</b> 4/8/15			
<b>Updates:</b>			
<b>Recommendation:</b>			
<b>File 2 - Jamison</b>			

**1) First and Final Account and Report of Administrator, and 2) Petition for Its Settlement, 3) for Allowance of Statutory Fees and Reimbursement of Costs, and 4) for Final Distribution**

<b>DOD:4/19/14</b>	<b>KATHRYN V. BRYSON</b> , Daughter and Administrator with Will Annexed with Full IAEA without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Account period: 4/20/14 – 1/31/15	
	Accounting: \$192,841.51	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Beginning POH: \$192,641.51	
<input checked="" type="checkbox"/> <b>Verified</b>	Ending POH: \$191,686.37	
<input checked="" type="checkbox"/> <b>Inventory</b>	(\$60,986.37 cash plus real property, two vehicles, personal property)	
<input checked="" type="checkbox"/> <b>PTC</b>		
<input checked="" type="checkbox"/> <b>Not.Cred.</b>	Administrator (Statutory): Waived	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Attorney (Statutory): \$6,752.81	
<input checked="" type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>	Costs: \$1,671.64 (filing, publication, certified letters, appraisal)	
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>	Distribution pursuant to Decedent's will:	
<input type="checkbox"/> <b>Conf. Screen</b>	Kathryn V. Bryson: \$25,905.96 cash plus a 50% undivided interest in the real property, two vehicles, personal property	
<input checked="" type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>	Gary W. Bryson: \$25,905.96 cash plus a 50% undivided interest in the real property, two vehicles, personal property	
<input type="checkbox"/> <b>CI Report</b>		
<input checked="" type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input checked="" type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> skc
		<b>Reviewed on:</b> 4/8/15
		<b>Updates:</b>
		<b>Recommendation:</b> SUBMITTED
		<b>File 3 - Bryson</b>

(1) First and Final Account and Report of Executor and Petition for Its Settlement,  
for (2) for Allowance of Fees and Reimbursement of Costs, and for (3) Final  
Distribution

<b>DOD: 3/7/14</b>	<b>IRAN RODRIGUES</b> , Surviving Spouse and Executor with Full IAEA without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from</b>	Account period: 3/7/14 – 12/31/14	
<b>Aff.Sub.Wit.</b>	Accounting: \$428,333.33	
<input checked="" type="checkbox"/> <b>Verified</b>	Beginning POH: \$428,333.33	
<input checked="" type="checkbox"/> <b>Inventory</b>	Ending POH: \$428,333.33 (real property and business interest)	
<input checked="" type="checkbox"/> <b>PTC</b>	Administrator (Statutory): Waived	
<input checked="" type="checkbox"/> <b>Not.Cred.</b>	Attorney (Statutory): \$11,567.00	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Costs: \$1,759.83 (filing, publication, certified letters, appraisal)	
<input checked="" type="checkbox"/> <b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>	Pursuant to Agreement for Payment of Attorneys Fees and Costs, Trenton J. Marks and Cassie J. Rettig, beneficiaries hereunder, agree to each pay a share of the approved fees and costs as set forth in the agreement.	
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>	Distribution pursuant to Decedent's will:	
<input checked="" type="checkbox"/> <b>Letters</b>	Trenton J. Marks: Decedent's real property in Fresno, CA	
<b>Duties/Supp</b>		
<b>Objections</b>	Cassie J. Rettig: Decedent's 1/3 undivided interest in real property in Shaver Lake, CA, plus Decedent's business interests.	
<b>Video Receipt</b>		
<b>CI Report</b>		
<input checked="" type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<input checked="" type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> skc
		<b>Reviewed on:</b> 4/8/15
		<b>Updates:</b>
		<b>Recommendation:</b> SUBMITTED
		<b>File 4 – Best-Rodrigues</b>

<b>DOD: 8-1-13</b>		<b>PRIMAVERA DAMME</b> , Daughter, is Petitioner and requests appointment as Administrator with Full IAEA with bond of \$175,000.00.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
			<b>Note:</b> This is the 5 <sup>th</sup> hearing on this petition. The following issues remain:
<b>Cont from 110314, 120314, 011315, 030315</b>		Petitioner is a resident of Mesa, AZ.	1. Need Order.
	<b>Aff.Sub.Wit.</b>	Full IAEA – ok	2. Need Letters.
✓	<b>Verified</b>	Decedent died intestate	<b>Note:</b> If granted, status hearings will be set as follows:
	<b>Inventory</b>		• Tues, June 2, 2015 for filing of bond
	<b>PTC</b>	Residence: Fresno	• Tues, Sept. 15, 2015 for filing of inventory and appraisal
	<b>Not.Cred.</b>	Publication: Business Journal	• Tues, July 14, 2016 for filing of the first account or petition for final distribution.
✓	<b>Notice of Hrg</b>	Estimated value of estate:	If the above items have been properly filed pursuant to Local Rule 7.5, the status hearings may come off calendar. Otherwise, status report is required.
✓	<b>Aff.Mail</b>	Personal property: \$ 5,000.00	
✓	<b>Aff.Pub.</b>	Real property: \$ 170,000.00	
	<b>Sp.Ntc.</b>	Total: \$ 175,000.00	
	<b>Pers.Serv.</b>	Probate Referee: Rick Smith	
	<b>Conf. Screen</b>		
	<b>Letters</b>	x	
✓	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202</b>		
	<b>Order</b>	x	
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		

<b>Reviewed by:</b> skc
<b>Reviewed on:</b> 4-8-15
<b>Updates:</b> 4-9-15
<b>Recommendation:</b>
<b>File 5 – Valencia</b>

Atty Teixeira, J. Stanley (for Jennifer Kapur Kirklin – Petitioner)  
 Atty Roberts, Gregory J. (for Dana Kahler – Trustee/Respondent)

**Probate Status Hearing RE: Accounting of Dana Kahler and Waivers of Bond**

DOD: 01/17/13		<b>JENNIFER KAPUR KIRKLIN</b> , granddaughter and beneficiary filed a <b>Petition for Removal of Trustee, Account and to Appoint Successor Trustee</b> on 11/03/14.  On 01/27/15, Respondent, Dana Kahler, filed a <b>Response of Trustee of Petition for Removal of Trustee Account and to Appoint Successor Trustee</b> .  <b>Minute Order</b> from hearing on 02/03/15 set this matter for a Status Hearing re: Accounting of Trustee and Waivers of Bond.  <b>Status Declaration of Counsel for Trustee Regarding Accounting</b> filed 02/26/15 states: The Court ordered the Trustee to file an accounting with the Court by 03/03/15. Attorney received the accounting documents from the trustee on 02/25/15 and has not been able to prepare the accounting in the court format. It appears that all of the information is there to prepare the accounting, but additional time will be needed. A 30 day continuance is respectfully requested.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>CONTINUED FROM 03/03/15</u> <b>Minute Order</b> from 03/03/15 states: Mr. Teixeira is appearing via CourtCall. Matter continued to 04/14/15 for the accounting of Dana Kahler and waivers of bond. If the required documents are filed two court days before the hearing, no appearance will be necessary.  <b>As of 04/08/15, nothing further has been filed.</b>
Cont. from 030315			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: JF Reviewed on: 04/08/15 Updates: Recommendation: File 6 - Kasabian	

Petition for Appointment of Probate Conservator of the Estate (Prob. C. 1820, 1821, 2680-2682)

		<b>NO TEMPORARY REQUESTED</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from 030315</b>		<b>JILL MCCOOL</b> , daughter, is Petitioner and requests appointment as Conservator of the Estate with Probate Code § 2590 powers.	<b>OFF CALENDAR</b> <b>First Amended Petition for Appointment of Probate Conservator filed 4/6/2015 is set for hearing on 5/18/2015.</b>
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	~Please see Petition for details~	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	Court Investigator's Report was filed on 2/24/2015.	
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input checked="" type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<b>[Additional page omitted]</b>	<p>1. Caption of the <i>Petition</i> requests appointment of probate conservator of the estate only. Item 1(a) and 1(b) of the <i>Petition</i> request appointment of both conservator of the person and of the estate. Item 1(g) of the <i>Petition</i> requests the proposed Conservatee be adjudged to lack the capacity to give informed consent for medical treatment, which is a request associated with conservatorship of the person. Further, Item 5(c) of the <i>Petition</i> states the reasons the proposed Conservatee requires a conservator of the person are not applicable as the <i>Petition</i> is for conservatorship of the estate only. Need clarification and/or amended <i>Petition</i>.</p> <p>2. <i>Capacity Declaration</i> was filed on 2/4/2015, and <i>Declaration of Gary L. Winter</i> was filed 2/18/2015 to include the previously omitted Page 2 of the <i>Capacity Declaration</i>. However, because the <i>Petition</i> does not request conservatorship of the person, the purpose of these filings is unclear unless the <i>Petition</i> is amended to include a clear request for conservatorship of the person.</p> <p><b>[Additional page omitted]</b></p>
			<b>Reviewed by:</b> LEG
			<b>Reviewed on:</b> 4/9/15
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 7 - Britton</b>



Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450).  
(Lost Will)

<b>DOD: 10/13/2014</b>		<b>PUBLIC ADMINISTRATOR</b> , is petitioner and requests appointment as Administrator with Will Annexed without bond.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from 031015</b>		Full IAEA – o.k.	<b>Minute Order of 03/10/2015: Counsel requests time to re-notice due to intestacy; will file a declaration regarding change in the distribution.</b>
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		<ol style="list-style-type: none"> <li><b>Amendment to Petition for Probate Resulting in Intestate Succession</b> was filed 03/24/2015. This Amendment to the Petition changes the material facts of the petition filed 01/28/2015, therefore an amended petition is required with notice to all interested parties.</li> <li>Petition does not provide any information surrounding the facts that the will was lost. Probate Code §6124 states if the testator's will was last in the testator's possession, the testator was competent until death, and neither the will nor a duplicate original of the will can be found after the testator's death, it is presumed that the testator destroyed the will with intent to revoke it. This presumption is a presumption affecting the burden of producing evidence. Petitioner has not provided anything to rebut the presumption that the will was not destroyed with the intent to revoke.</li> <li>Notice must indicate Petition of a Lost Will pursuant to California Rule of Court 7.50.</li> <li>Order does not comply with the Probate Code §8223, copy of the will must be included with the order.</li> <li>Will is not self-proving. Need proof of subscribing witness.</li> </ol>
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	w/	
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		<p><b>Estimated value of the Estate:</b>            Personal property \$368,663.20            Real property \$63,195.00  <b>Total \$431,858.20</b></p> <p>Probate Referee: Steven Diebert</p>
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		<p><b>Reviewed by:</b> LV</p> <p><b>Reviewed on:</b> 04/09/2015</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 8 - Woof</b></p>
<input type="checkbox"/>	<b>FTB Notice</b>		

**Note:** If the petition is granted status hearings will be set as follows:

- **Tuesday, 07/07/2015 at 9:00a.m. in Dept. 303** for the filing of the inventory and appraisal **and**
- **Tuesday, 05/10/2016 at 9:00a.m. in Dept. 303** for the filing of the first account and final distribution.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.

Atty McKinney, Russell R., of Visalia (for Petitioner Mickey Lee Chaffin)

## Petition to Determine Succession to Real Property (Prob. C. 13151)

<b>DOD: 8/21/2014</b>	<b>MICKY LEE CHAFFIN</b> , son, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	40 days since DOD	
<b>Cont. from</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	No other proceedings	
<input checked="" type="checkbox"/> <b>Verified</b>		
<input checked="" type="checkbox"/> <b>Inventory</b>	I & A - \$ 85,000.00	
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Will dated 10/22/1997 devises entire estate to spouse (DOD 10/29/2000), and if spouse predeceased, then to Petitioner.	
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	w/	
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>	<b>Petitioner requests</b> Court determination that Decedent's <b>100%</b> interest in real property located at 908 Ninth, Orange Cove, passes to the Petitioner pursuant to Decedent's Will.	
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> LEG
		<b>Reviewed on:</b> 4/9/15
		<b>Updates:</b>
		<b>Recommendation:</b> SUBMITTED
		<b>File</b> 9 - Chaffin

## Probate Status Hearing Re: Failure to File Petition for Final Distribution

<b>DOD: 3-7-06</b>	<b>HAL B. HAVLISCH</b> was appointed Executor with Full IAEA without bond and Letters issued on 5-24-06.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont'd from 31414, 111814, 120914, 021015</b>	<b>Final Inventory and Appraisal filed 10-27-06</b> indicated a total estate value of \$148,162.92, including \$3,517.92 cash plus real property, personal property including a stamp collection valued at \$1,500.00, and a vehicle.	<b>Note:</b> The Executor, attorney Hal B. Havlisch, was previously represented by attorney Thomas C. Peterson, now deceased.
<b>Aff.Sub.Wit.</b>	<b>On 11-30-06</b> , a Notice of Proposed Action was filed indicating that the Executor intended to sell the real property for \$100,000.00 cash.	<b>Note:</b> The decedent's will devises the entire estate to GOOD SHEPHERD LUTHERAN HOME OF THE WEST in Fountain Valley, CA.
<b>Verified</b>		
<b>Inventory</b>	<b>Nothing further was filed.</b>	<b>Minute Order 2-10-15:</b> The Court directs that a Corrected Inventory and Appraisal be filed if the original was incorrect. If the petition is not filed by 4-10-15, then a verified status report must be filed by the same date.
<b>PTC</b>		
<b>Not.Cred.</b>	<b>On 12-20-13</b> , the Court set this status hearing for failure to file a first account or petition for final distribution and mailed notice to Hal B. Havlisch.	As of 4-8-15, nothing further has been filed.
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>	<b>The most recent status report was filed on 12-4-14. See Page 2.</b>	<b>Note:</b> See Page 2 re updated status report.
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		1. Need first account or petition for final distribution.
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		<b>Note:</b> This estate has been open since 2006 (over 8 years) without accounting.
<b>Letters</b>		
<b>Duties/Supp</b>		<b>Reviewed by:</b> skc
<b>Objections</b>		
<b>Video Receipt</b>		<b>Reviewed on:</b> 4-8-15
<b>CI Report</b>		
<b>9202</b>		<b>Updates:</b>
<b>Order</b>		
<b>Aff. Posting</b>		<b>Recommendation:</b>
<b>Status Rpt</b>		
<b>UCCJEA</b>		<b>File 10 – Muhley</b>
<b>Citation</b>		
<b>FTB Notice</b>		

**Status Report filed 12-4-14 states** the house has decreased in value to \$72,000 in 2008 and has now increased to \$123,000 according to [www.zillow.com](http://www.zillow.com). The home was built in 1927. Executor has made all necessary repairs out of his own funds including a new foundation, wiring, plumbing, roof, refrigeration and heating unit, kitchen, floor, interior and exterior paint, window treatments, termite damage.

The Executor states when the repairs were done the home was rented in June 2011 to a disabled woman who was receiving Section 8 subsidy. The only money received was from what Section 8 paid, as the tenant could not afford additional rent. The home is not in the best of areas and it was considered a good investment to not have the home sitting empty to avoid damage due to vandalism. The tenant paid utilities and kept up the property while the remaining repairs were done.

The house is now empty and has been listed with London Properties for \$130,000.00. The 1977 Dodge Monaco Broagham was sold for the appraised value of \$2,500.00, although there were expenses involved in the sale of the vehicle (smog, DMV, etc.). The furniture has been sold for the appraised value. The stamp collection is intact and can be disbursed to the beneficiaries. At the present time, there is no estate bank account, but estate funds have been placed in Executor's attorney's trust account with an approx. balance of \$600.00.

Executor states the Waiver of Accounting and Petition for Final Distribution will be filed at the close of escrow.

**Examiner's Note:** *Mr. Havlisch states funds have been placed in his attorney's trust account; however, Mr. Havlisch is now self-represented and used a non-attorney legal document service to file this status report. Need clarification regarding the "attorney trust account."*

**Status Report filed 1-20-15 states the I&A filed 10-27-06 states an incorrect value (\$140,000.00). The home was originally listed with a realtor for \$130,000.00, but there has been a low interest at the listed price; therefore, the listing price has been lowered to \$124,900.00.**

**Examiner's Note:** *The I&A value is the value as of the decedent's date of death, not the market value. However, if the Executor feels that the I&A value is incorrect, a Corrected I&A should be filed.*



Status Hearing Re: Filing of the Proof of Establishing a Guardianship in Missouri

		<b>BRANDI CHAVONNE LANIER</b> , guardian, filed an ex parte Petition to Fix Residence Outside the State of California on 3-6-14.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Minute Order 1-6-15:</b> Ms. Lanier is to advise her legal help that the Court needs an estimated date as to when the guardianship can be established in Missouri.
<b>Cont. from 071814, 111814, 010615</b>		The Court set the matter for hearing on 3-19-14.	<b>1. Need proof of establishment of guardianship or equivalent in Missouri pursuant to Probate Code §2352(d).</b>
<b>Aff.Sub.Wit.</b>		At the hearing on 3-19-14, the Court granted the petition and set this status hearing for the filing of proof of guardianship in Missouri.	
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>		<b>Status Report filed 7-9-14</b> states the family move to Springfield, Missouri on 3-22-14. Since moving, Caitlin and Autumn have been doing well and are in communication with their parents. On 6-23-14, Mrs. Lanier met with an attorney from Legal Services of Southern Missouri, who told her that guardianship could not be established in Missouri until they had resided there for six months pursuant to the Uniform Child Custody Jurisdiction and Enforcement Act. Mrs. Lanier intends to contact the attorney in October to establish guardianship.	
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>		Mrs. Lanier therefore requests that the Court postpone the status hearing until after November 15, 2014, and that the California Guardianship remain in full force and effect until guardianship in Missouri can be established.	
<b>Citation</b>			
<b>FTB Notice</b>			
		<b>Status Report filed 12-31-14 states</b> Ms. Lanier has been approved to receive legal representation through Legal Services of Southern Missouri's Volunteer Lawyer Project to establish a guardianship in the State of Missouri. Attached are notarized consent forms signed by both parents, Kenneth Lanier and Erin Zane.	<b>Reviewed by:</b> skc <b>Reviewed on:</b> 4-8-15 <b>Updates:</b> <b>Recommendation:</b> <b>File 12 – Lanier</b>

**Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution**

<b>DOD: 01/13/2013</b>	<p><b>GLORIA B. LEDOUX</b>, sister, was appointed Administrator with limited IAEA authority without bond on 11/06/2013.</p> <p>Letters issued on 11/06/2013.</p> <p>Inventory and Appraisal filed 11/08/2013 shows an estate valued at \$180,000.00.</p> <p>Minute Order of 11/06/2013 set this matter for hearing for the filing of the First Account and/or Petition for Final Distribution.</p> <p><b>Status Report filed 04/03/2015</b> states the estate remains open with the only asset consisting of an undivided one half interest in real property located at 1515 Rose Ave, Selma Ca. The property does not produce income and all expenses are being paid by the Administrator as the owner of the remaining one half interest who resides in the property. The heirs of the estate have all expressed a desire to keep the property in the family and allow the administrator the right to continue to reside at the property.</p> <p>In order to distribute the property in undivided interests, the administrator is working on settling the creditor's claims and expenses of administration outside of the estate assets. Additional time is requested to settle the claims.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute Order of 01/09/2015: Counsel requests 90 days. If the petition is filed at least two court days prior to the hearing, then no appearance is necessary on 04/14/2015.</b></p> <p>1. Need First Account or Petition for Final Distribution.</p>
<b>Cont. from 010915</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		

<b>Reviewed by:</b> LV
<b>Reviewed on:</b> 04/09/2015
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 13 - Morales</b>



**Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution**

<b>DOD: 09/03/2013</b>	<b>HEATHER D. SANDSTROM</b> , daughter, was appointed Administrator with full IAEA with bond set at \$188,000.00 on 11/06/2013.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Minute Order of 01/09/2015: Counsel requests 90 days. If the petition is filed at least two Court days prior to the hearing, then no appearance is necessary.</b>  1. Need First Account or Petition for Final Distribution current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
<b>Cont. from 010915</b>	Receipt of Bond filed 12/02/2013 in the amount of \$188,000.00.	
<b>Aff.Sub.Wit.</b>	Letters issued on 12/04/2013.	
<b>Verified</b>		
<b>Inventory</b>	Partial No. 1 Inventory and Appraisal filed 01/23/2014 shows an estate valued at \$297,900.00.	
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	Final (Corrected) Inventory and Appraisal filed 03/13/2014 shows an estate valued at \$2,600.00.	
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>	Minute Order of 11/06/2013 set this matter for hearing for the filing of the First Account and/or Petition for Final Distribution.	
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>	<b>Former Status Report of Gary L. Winter, Attorney for Administrator filed 01/05/2015</b> states the administrator is currently working on a way to settle the account with the Decedent's surviving spouse so that the real property can pass to Administrator (Decedent's daughter) and/or Administrator's sister. There is a debt owing on the real property that the Administrator is figuring out financing for her. There is significant tension between the decedent's daughters (Administrator and her sister) and the decedent's surviving spouse, so passing the real property in kind would not be feasible to all three parties. It is anticipated that a 90 day continuance to file the First and Final Report and Petition for Distribution of Decedent's Estate will be adequate time to resolve the issue of the real property.	
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		

**Reviewed by:** LV

**Reviewed on:** 04/10/2015

**Updates:**

**Recommendation:**

**File 14 - Miller**

## Petitioner, Dale Stevens' First Partial Accounting

		<p><b>DALE STEVENS</b>, as the purported, proper, successor Trustee of the Edith Lillian Mitchell Stevens Revocable Trust, is petitioner.</p> <p><b>Petitioner states</b> Robert Stevens is indisputably the Trustee of the Sam C. Stevens Revocable Living Trust. Robert Stevens has produced and provided no discovery documents of any kind to present a more complete accounting. Dale Stevens has produced initially 269 pages of source documents, transaction receipts, paid utility statements, and similar source documents to Robert Stevens' attorney in accordance with the Court's most recent order in this case that the Parties engage in a mutual disclosure of documents.</p> <p>Therefore Dale Stevens can only provide this "partial" accounting because Robert Stevens is not observing the current Order of the Court nor administering the Sam C. Stevens Revocable Trust in accordance with the Code.</p> <p>The Petition for Instructions that initiated these proceedings asked for instructions and findings from the Court. The Court has yet to rule upon those three fundamental, foundational facts, which must be decided by Findings of the Court, before any actual attempt at reconciliation between the two Trusts can realistically be envisioned.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>Continued from 3/17/15. Minute order states Ms. Standard wants the matter set for trial; there is a one day time estimate. Ms. LeVan has just substituted in and needs time. Ms. Standard is to file a Status Report at least two court days prior to 4/14/15. The Court wants written proof of Kingsburg City's commitment to not act on the 940 Mariposa property.</p> <ol style="list-style-type: none"> <li>1. The accounting does not comply with Probate Code §1060 et seq.</li> <li>2. Need Notice of Hearing.</li> <li>3. Need proof of service of the Notice of Hearing on all interested parties.</li> <li>4. Need Order.</li> </ol>	
Cont. from 010515, 012715, 031715				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			X
<input type="checkbox"/>	Aff.Mail			X
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input type="checkbox"/>	Order	X		
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
Please see additional page		<p><b>Reviewed by:</b> KT</p> <p><b>Reviewed on:</b> 4/9/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 15A - Stevens</b></p>		

## **15A Edith Lillian Mitchell Stevens Rev. Liv. Trust Case No. 13CEPR00943**

The three fundamental issues (for which Instructions were sought by Petitioner) are set forth in the Petition for Instructions, as follows:

1. An adjudication, Finding, and Instruction from the Court that, under operation [the first paragraph of Section VIII] the Third Trust Amendment Dated February 11, 2008, Petitioner Clarence Dale Stevens is confirmed as the due, proper and only Successor Trustee of THE EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST dated November 2, 1983, as Amended on May 4, 2007, as additionally amended on May 9, 2007, and as further Amended on February 11, 2008.
2. An adjudication, Finding, and Instruction from the Court that the Third Trust Amendment of THE EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST dated November 2, 1983, as Amended on May 4, 2007, as additionally amended on May 9, 2007, and as further Amended on February 11, 2008 is in full force and effect.
3. An adjudication, Finding, and Instruction from the Court that the Third Trust Amendment of the THE EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST dated November 2, 1983, as amended, controls and instructs the Petitioner/Successor Trustee how the Trust Estate contained within THE EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST dated November 2, 1983, as Amended, shall be distributed.

Attached to the Petition is Restated Operating Summaries of all rents received and all debts and expenses paid by the Petitioner, for the years 2012, 2013 and partially into 2014 for the various Trust parcels of real property he has been administering since Edith Stevens died in 2012.

There can be no financial reconciliation between the two Trusts until the Court adjudicates the three foundational issues set forth above.

The Second Amendment to the Trust and the Third Amendment to the Trust changes the distributive shares of the beneficiaries.

Respondent Robert Stevens, submits that the Second and Third Amendments should be declared invalid so that the entire two Trust Estates can be divided equally among the four beneficiaries.

Petitioner Dale Stevens submits that both the Second and Third Trust Amendments should be declared valid and operative – and until that happens, the Parties cannot move forward to resolution of this matter.

**Probate Status Hearing RE: Settlement and First Amended Petition for Instructions and to Determine Entitlement**

		<p><b>Status Report filed on 1/20/15 filed by Donna Standard on behalf of her client ROBERT STEVENS states:</b></p> <p>On 11/2/1983, <b>SAM</b> and <b>EDITH STEVENS</b> created two trusts; one entitled the <b>SAM C. STEVENS REVOCABLE TRUST</b> and the other entitled <b>THE EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST</b>. At the time each party consented to the transfer of community property into each other's trust, which was designated to be divided among their children at the time of execution. There children were <b>ROBERT DUANE STEVENS, BETTY LOU AMELINO, LARRY BRYAN STEVENS</b> and <b>CLARENCE DALE STEVENS</b> all of whom are still living.</p> <p><b>SAM C. STEVENS</b> died on 9/27/1997. <b>EDITH STEVENS</b> became the Successor Trustee of Sam's Trust.</p> <p><b>EDITH STEVENS</b> thereafter purportedly amended her trust, after the death of <b>SAM C. STEVENS</b>, excluding almost entirely, all of her other children from taking as originally planned. There were only nominal payments to her other three children. Edith also purportedly changed her successor Trustee from <b>ROBERT D. STEVENS</b> to <b>CLARENCE DALE STEVENS</b>, however <b>ROBERT STEVENS</b> believes all of these changes were accomplished by the undue influence of <b>CLARENCE DALE STEVENS</b>, and further, Edith was not of sound mind at the time of the execution. Pursuant to her death certificate, Edith died on 3/12/12 from end stage dementia.</p> <p style="text-align: center;"><b>Please see additional page</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>Continued from 3/17/15. Minute order states Ms. Standard wants the matter set for trial; there is a one day time estimate. Ms. LeVan has just substituted in and needs time. Ms. Standard is to file a Status Report at least two court days prior to 4/14/15. The Court wants written proof of Kingsburg City's commitment to not act on the 940 Mariposa property.</p> <p><b>Note:</b> The Sam C. Stevens Trust is not before the court nor is the Edith Lillian Mitchell Stevens' Will before the court. If the parties want to have the court rule on the issues regarding the Sam C. Stevens Trust or the Edith Lillian Mitchell Stevens Will then separate proceedings will need to be commenced regarding those instruments.</p>
<b>Cont. from 012715, 031715</b>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			

<b>Reviewed by: KT</b>
<b>Reviewed on: 4/9/15</b>
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 15B - Stevens</b>

Further, Edith executed so many different documents changing the terms of the Trust originally executed, that her intent for disposition of her estate is not clear. Edith also executed a Will, after all of the amendments, which has been purportedly denied by her in an alleged writing created by **CLARENCE DALE STEVENS** after staying with her son Larry. The Will purportedly divided her estate equally between her children again, as was originally contained in the Trust document.

The issue of the validity of any amendments executed by Edith is the primary focus of this proceeding, as well as the validity of a Will executed by Edith after the execution of the purported amendments.

On 11/11/14, the parties appeared for a Mandatory Settlement Conference. The conference was not held due to the fact that **CLARENCE DALE STEVENS** terminated the employment of his attorney Michael Karby and further because after the deposition of **CLARENCE DALE STEVENS** it was determined that additional discovery was necessary. **CLARENCE DALE STEVENS** was given an additional 60 days to obtain new counsel. A hearing was set for status on 1/27/15.

**CLARENCE DALE STEVENS** has not obtained new legal counsel. **CLARENCE DALE STEVENS** is precluded from acting as his own attorney as he is acting as the Trustee of the **EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST** and claims to be the valid Trustee pursuant to a third amendment to the Trust, executed at a time when **CLARENCE DALE STEVENS** was care giving for Edith and she was suffering dementia.

Objector/Beneficiary, **ROBERT STEVENS** is prepared and ready for trial in this matter. **ROBERT STEVENS** has made several proposals for settlement in this matter, none of which have been agreed to by **CLARENCE DALE STEVENS**.

Accountings have been filed, however, neither party is in a position to prepare full accountings, until there is a determination as to who is the proper Trustee of the **EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST**.

The matter of the validity of the Trust documents and/or her Will needs to be resolved before any further action in this proceeding can occur.

**ROBERT STEVENS** request this matter be set for trial, with the issue of the validity of the Trust and/or Will of **EDITH LILLIAN MITCHELL STEVENS** being bifurcated from any other issues.

This matter is completely stalled however, as long as **CLARENCE DALE STEVENS** is not represented by legal counsel.

Atty LeVan, Nancy (for Dale Stevens)

Atty Standard, Donna (for Robert Stevens)

## Probate Status Hearing RE: Repairs to the Two Properties

		<p>There is a dispute between <b>Dale Stevens</b> and <b>Robert Stevens</b> as to the validity of amendments to the Trust. Please see pages 15A and 15B.</p> <p><b>Minute order dated 3/17/15 set this status hearing re: Repairs to the Two Properties.</b> Ms. Standard is to file a Status Report at least two court days prior to 4/14/15. The Court wants written proof of Kingsburg City's commitment to not act on the 940 Mariposa property.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. <b>Need current written status report.</b> Minute order dated 3/17/15 required the status report to be filed no later than 2 court days prior to the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: KT	
		Reviewed on: 4/9/15	
		Updates:	
		Recommendation:	
		File 15C - Stevens	

15C

**Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)**

		See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  Court Investigator advised rights on 4/7/15.  Voting rights affected – need minute order.  1. Need Citation.  2. Need proof of personal service of Citation with a copy of the petition at least 15 days prior to the hearing pursuant to Probate Code §1824 on Proposed Conservatee Sabrina B. Palmer.  3. Need proof of 30 days' notice to CVRC pursuant to Probate Code §1822(e).  4. Need Video Receipt pursuant to Local Rule 7.15.8.A.  5. The proposed Conservatee's only income is social security. The Court may require clarification with reference to Local Rule 7.15.4. If conservatorship of the estate is established, need bond of \$7,810.00 pursuant to Probate Code §2320(c)(4) and Cal. Rule of Court 7.207.  6. Need Order.  7. Need Letters.  <u>Note:</u> The powers, other than medical consent, delineated in §2351-2358 are inherent to a general conservatorship and need only be specifically granted in orders for limited conservatorship.	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			X
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation	X		
	FTB Notice			

**17A Christian Vang and Jacob Vang (GUARD/P) Case No. 06CEPR00894**

**Atty Moua, Cynthia (pro per – maternal grandmother/co-guardian)**

**Atty Moua, Terry (pro per – maternal grandfather/co-guardian)**

**Atty Moua, Michelle (pro per – mother/objector)**

**Atty Vang, Yee (pro per – father/Petitioner)**

**Petition for Termination of Guardianship (of Christian Vang, Jacob Vang)**

<b>Christian, 5</b>	<b>YEE VANG</b> , father, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Jacob, 4</b>	<b>CYNTHIA MOUA</b> and <b>TERRY MOUA</b> , maternal grandparents, were appointed as co-guardians of Jacob and Christian on 05/03/12. – <i>Cynthia and Terry Moua were served by mail on 03/19/15</i>	
<b>Cont. from</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Mother: <b>MICHELLE MOUA</b> – <i>served by mail on 03/27/15</i>	
<input checked="" type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>	Paternal grandfather: DECEASED Paternal grandmother: NENG LEE – <i>personally served on 03/14/15</i>	
<input type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	<b>Petitioner states</b> [see Petition for details].	
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	<b>Objection to Termination of Guardianship</b> filed 03/25/15 by Michelle Moua (mother) states: [See file for details].	
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input checked="" type="checkbox"/> <b>Pers.Serv.</b>	<b>Court Investigator Charlotte Bien filed a report on 03/30/15.</b>	
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input checked="" type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input checked="" type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 04/09/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 17A - Vang</b>

**17A**



**17B Noah Vang (GUARD/P)**  
**Atty Carrasco, Chue Vang (pro per – paternal aunt/co-guardian)**  
**Atty Carrasco, Octavio (pro per – paternal uncle/co-guardian)**  
**Atty Moua, Michelle (pro per – mother/objector)**  
**Atty Vang, Yee (pro per – father/Petitioner)**

**Case No. 06CEPR00894**

**Petition for Termination of Guardianship (of Noah Vang)**

<b>Noah, Age: 10</b>		<b>YEE VANG</b> , father, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>CHUE CARRASCO</b> and <b>OCTAVIO CARASCO</b> , paternal aunt and uncle, were appointed as co-guardians of Noah Vang on 01/30/12. – Chue & Octavio Carasco were personally served on 03/14/15	
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>	Mother: <b>MICHELLE MOUA</b> – served by mail on 03/27/15	
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>	Paternal grandfather: DECEASED	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Paternal grandmother: NENG LEE – personally served on 03/14/15	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	w/	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>	Maternal grandfather: TERRY MOUA – served by mail on 03/19/15	
<input checked="" type="checkbox"/>	<b>Pers.Serv.</b>	w/	
<input type="checkbox"/>	<b>Conf. Screen</b>	Maternal grandmother: CYNTHIA MOUA – served by mail on 03/19/15	
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>	<b>Petitioner states</b> [see Petition for details].	
<input type="checkbox"/>	<b>Objections</b>	<b>Objection to Termination of Guardianship</b> [see file for details].	
<input checked="" type="checkbox"/>	<b>CI Report</b>	<b>Court Investigator Charlotte Bien filed a report on 03/30/15.</b>	
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> JF
			<b>Reviewed on:</b> 04/09/15
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 17B - Vang</b>

**17B**

**Atty Alvarez-Garcia, Maria (Pro Per – Maternal Grandmother – Guardian)**

**Atty Garcia, Alfredo (Pro Per – Maternal Grandfather – Guardian)**

## Petition for Visitation

[illegible]

**19**      **Leeanjdra Herrera, Brijido Frank Herrera, Jr., and**  
**Isaiah Andres Sanchez Almaguer, Jr. (GUARD/P) Case No. 12CEPR00752**  
**Atty**      **Herrera, Brijido F. (Pro Per – Father of Leeanjdra and Brijido, Jr. – Petitioner)**  
**Atty**      **Sanchez, Leonardo (Pro Per – Maternal Grandfather – Guardian)**  
**Atty**      **Sanchez, Rosalinda S. (Pro Per – Maternal Grandmother – Guardian)**  
**Petition for Visitation**

See petition for details.			<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note:</b> This petition pertains to minors Leeanjdra and Brijido, Jr., only.  1. Need Notice of Hearing.  2. Need proof of service of Notice of Hearing at least 15 days prior to the hearing on: - Leonardo Sanchez (Guardian) - Rosalinda Sanchez (Guardian)  3. The Court may also require notice to the mother, Rosalinda Soria Sanchez, and other relatives.
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc Reviewed on: 4/9/15 Updates: Recommendation: File 19 – Herrera & Almaguar

**20**      **Ila Emarie Gonzalez (GUARD/P)**  
 Atty      Hernandez, Ila S. (Pro Per – Mother – Petitioner)  
 Atty      Gonzalez, Adam (Pro Per – Paternal Grandfather – Guardian)  
 Atty      Gonzalez, Leticia (Pro Per – Paternal Grandmother – Guardian)  
                  Petition for Termination of Guardianship

Case No. 12CEPR00845

		See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Notice of Hearing.  2. Need proof of service of Notice of Hearing at least 15 days prior to the hearing on the guardians and <u>all</u> relatives pursuant to Probate Code §1460(b)(5): - Adam Gonzalez (Guardian and Paternal Grandfather) - Leticia Gonzalez (Guardian and Paternal Grandmother) - Adam Gonzalez, Jr. (Father) - Rosa Angela Mejia (Maternal Grandmother)	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 4/9/15	
			Updates:	
			Recommendation:	
			File 20 - Gonzalez	

**Motion to Remove Counsel**

		<p><b>JAMIE S THOMAS</b>, Beneficiary, is Petitioner.</p> <p>Petitioner moves the Court for an order removing <b>MICHAEL A. MILNES</b> as counsel from this action.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>		<p>Petitioner states she has tried numerous times to contact Mr. Milnes by phone, and he does not answer or return her calls. He has made himself unavailable to sign a substitution of attorney.</p> <p>Petitioner requests the removal of Mr. Milnes so that she may obtain new counsel. She cannot obtain new counsel until the Court has approved the removal of Mr. Milnes.</p>	
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			<p>Attached declaration states Mr. Milnes has failed to provide Petitioner with effective assistance. She has requested documents and information on hearings, but does not receive information. Mr. Milnes provides court documents for signature with a deadline for filing in an untimely manner.</p> <p>Petitioner has also become aware that Mr. Milnes license has been suspended and he should not even be practicing.</p> <p>Proof of Service by Mail indicates service of this motion on Michael Milnes on 3/3/15.</p>
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
			<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 4-9-15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 21 - Hamilton</b></p>

**Amended Petition for Probate of Will and for Letters Testamentary**

<b>DOD: 10-16-14</b>		<p><b>DEBORA A. CAVANAUGH</b>, Daughter and named alternate executor without bond, is Petitioner.</p> <p>Full IAEA: ok</p> <p>Will dated 11-17-94</p> <p>Residence: Kerman, CA Publication: Fresno Bee</p> <p>Estimated value of estate:  Personal property: \$ 3,000.00  Real property: \$158,000.00  Total: \$161,000.00</p> <p>Probate Referee: Rick Smith</p> <p><b>TERRY BREWER, Son, filed an objection on 12-29-14</b> in response to the prior petition for probate filed 11-26-14.</p> <p><b>Petitioner responded to the objection</b> in an attachment to this amended petition.</p> <p><b>See Page 2.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 3-10-15</b></p> <p><b>Note: If granted, the Court will set status hearings as follows:</b></p> <ul style="list-style-type: none"> <li><b>Tuesday, Sept. 15, 2015</b> for the filing of the Inventory and Appraisal</li> <li><b>Tuesday, July 12, 2016</b> for the filing of the first account or petition for final distribution.</li> </ul> <p>If the proper items are on file prior to the status hearing dates pursuant to Local Rule 7.5.C., then the status hearings may be taken off calendar. Otherwise, written status report and appearance is required.</p>	
<b>Cont from 031015</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			S/P
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>			
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>			w
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>			
<input checked="" type="checkbox"/>	<b>Letters</b>			
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>			
<input checked="" type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			

<b>Reviewed by:</b> skc
<b>Reviewed on:</b> 4-8-15
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 22 - Brewer</b>

## Page 2

**Objector states** the decedent died without a will or trust. The will attached is their father's will. Objector objects to Petitioner Debora A. Cavanaugh and his brother Donnie Brewer being appointed administrator and states he wishes to be appointed administrator. Objector states his brother Donnie stole at least \$65,000 from their mother and later moved into her house, where he still resides. Objector states Petitioner and Donnie are not trustworthy and would not fulfill their administrative and fiduciary duty to fairly administer and distribute the assets of the estate. Please see objection for additional allegations including fraud and elder abuse, and proposed estate management and distribution.

**Petitioner includes a response to the objection in this amended petition.** Petitioner states she located her mother's will after contacting the lawyer that completed her father's will. Both have been deposited, and the will of Emma JoAnn Brewer is attached to this amended petition. The will nominates Petitioner as executrix. Petitioner would like to know if Terry is contesting the will now that it has been found.

Petitioner states her mother was aware of the loan on the house; that she did take a loan on her house and loaned it to Donnie to buy a house. He was hoping to pay it off before they found out about it, but then lost his job. Petitioner states this was a loan, and he did not steal it. Their mother had the right to do whatever she wanted with her money when she was alive. She could have spent all her equity vacationing in Hawaii. She was not in bad shape with dementia until July 2011. In 2010, Petitioner, Donnie, and their mother went to a lawyer for power of attorney and health care directive. Petitioner was primary, Donnie was secondary. Donnie and his wife Sharon cared for their mother. See description of situation in petition and further description of estimated assets.

**Objector filed Supplemental Declaration on 3-9-15.** Objector states in light of the alleged "new" will, and in response to statements previously made by Petitioner, Objector submits additional information and respectfully requests a full accounting of bank records which will show the theft of estate property and funds by Donnie Brewer with the acquiescence of Debora Cavanaugh.

**Examiner's Note re Objector's supplemental declaration:** *The matter presently before the Court is Debora A. Cavanaugh's petition for appointment as personal representative, and admission of the decedent's will to probate. It is unclear if Objector intends this to be a will contest pursuant to Probate Code §8250; however, if so, no summons has been issued. Note that issues that occurred prior to the decedent's death or causes of action of fraud, financial elder abuse, etc., do not fall under the Probate Code and may need to be addressed in the civil court.*

Age: 27	<b><u>NO TEMPORARY REQUESTED</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>DENISE GARDINER</b> , mother, is Petitioner and requests appointment of Conservator of the Person.	<b>Court Investigator advised rights on 01/14/15.</b>
	Voting rights affected.	<b>Voting rights affected, need minute order.</b>
Cont. from 012715	<b>Petitioner states</b> [see petition for details].	<b><u>CONTINUED FROM 01/27/15</u></b>
Aff.Sub.Wit.	<b>Court Investigator Jennifer Daniel filed a report on 01/21/15.</b>	<b>As of 04/08/15, nothing further has been filed and the following notes remain:</b>
✓ Verified		1. Need <i>Notice of Hearing</i> .
Inventory		2. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Probate Conservator</i> for:
PTC		a. John Gardiner (father)
Not.Cred.		b. Tarik Tucker (brother)
Notice of Hrg	X	c. John Gardiner, III (brother)
Aff.Mail	X	d. Savannah Gardiner (sister)
Aff.Pub.		e. Stella Washington (grandmother)
Sp.Ntc.		3. Need <i>Citation</i> and proof of personal service of <i>Citation</i> with a copy of the <i>Petition for Appointment of Probate Conservator</i> at least 15 days before the hearing for Brianna Gardiner (proposed conservatee).
Pers.Serv.	X	4. Need <i>Confidential Conservator Screening Form</i> .
Conf. Screen	X	5. Need Receipt for watching conservatorship video.
✓ Letters		<b>Reviewed by:</b> JF
✓ Duties/Supp		<b>Reviewed on:</b> 04/08/15
Objections		<b>Updates:</b>
Video Receipt	X	<b>Recommendation:</b>
✓ CI Report		<b>File 23 - Gardiner</b>
9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation	X	
FTB Notice		



**Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)**

<b>Age: 28</b>  <b>Cont. from 012715</b> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 10%;"></td><td style="width: 80%;">Aff.Sub.Wit.</td><td style="width: 10%;"></td></tr> <tr><td>✓</td><td>Verified</td><td></td></tr> <tr><td></td><td>Inventory</td><td></td></tr> <tr><td></td><td>PTC</td><td></td></tr> <tr><td></td><td>Not.Cred.</td><td></td></tr> <tr><td></td><td>Notice of Hrg</td><td style="text-align: center;">x</td></tr> <tr><td></td><td>Aff.Mail</td><td style="text-align: center;">x</td></tr> <tr><td></td><td>Aff.Pub.</td><td></td></tr> <tr><td></td><td>Sp.Ntc.</td><td></td></tr> <tr><td></td><td>Pers.Serv.</td><td style="text-align: center;">x</td></tr> <tr><td></td><td>Conf. Screen</td><td style="text-align: center;">x</td></tr> <tr><td>✓</td><td>Letters</td><td></td></tr> <tr><td></td><td>Duties/Supp</td><td style="text-align: center;">x</td></tr> <tr><td></td><td>Objections</td><td></td></tr> <tr><td></td><td>Video Receipt</td><td style="text-align: center;">x</td></tr> <tr><td>✓</td><td>CI Report</td><td></td></tr> <tr><td></td><td>9202</td><td></td></tr> <tr><td>✓</td><td>Order</td><td></td></tr> <tr><td></td><td>Aff. Posting</td><td></td></tr> <tr><td></td><td>Status Rpt</td><td></td></tr> <tr><td></td><td>UCCJEA</td><td></td></tr> <tr><td></td><td>Citation</td><td style="text-align: center;">x</td></tr> <tr><td></td><td>FTB Notice</td><td></td></tr> </table>		Aff.Sub.Wit.		✓	Verified			Inventory			PTC			Not.Cred.			Notice of Hrg	x		Aff.Mail	x		Aff.Pub.			Sp.Ntc.			Pers.Serv.	x		Conf. Screen	x	✓	Letters			Duties/Supp	x		Objections			Video Receipt	x	✓	CI Report			9202		✓	Order			Aff. Posting			Status Rpt			UCCJEA			Citation	x		FTB Notice		<p style="text-align: center;"><b><u>NO TEMPORARY REQUESTED</u></b></p> <p><b>DENISE GARDINER</b>, mother, is Petitioner and requests appointment of Conservator of the Person.</p> <p>Voting rights affected.</p> <p><b>Petitioner states</b> [see Petition for details].</p> <p><b>Court Investigator Jennifer Daniel filed a report on 01/21/15.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Court Investigator advised rights on 01/14/15.</b></p> <p><b>Voting rights affected, need minute order.</b></p> <p><b><u>CONTINUED FROM 01/27/15</u></b>  <b>As of 04/08/15, nothing further has been filed and the following notes remain:</b></p> <ol style="list-style-type: none"> <li>6. Need Notice of Hearing.</li> <li>7. Need proof of service by mail at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Probate Conservator for:             <ul style="list-style-type: none"> <li>f. John Gardiner (father)</li> <li>g. Tarik Tucker (brother)</li> <li>h. Brianna Gardiner (sister)</li> <li>i. Savannah Gardiner (sister)</li> <li>j. Stella Washington (grandmother)</li> </ul> </li> <li>8. Need Citation and proof of personal service of Citation with a copy of the Petition for Appointment of Probate Conservator at least 15 days before the hearing for John Gardiner, III (proposed conservatee).</li> <li>9. Need Confidential Conservator Screening Form.</li> <li>10. Need Duties of Conservator. <b>Note:</b> Duties filed 12/12/14 are incomplete, the first page is the Duties form, but all subsequent pages are a copy of the Petition for Probate Conservator.</li> <li>11. Need Receipt for watching conservatorship video.</li> </ol> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td><b>Reviewed by:</b> JF</td></tr> <tr><td><b>Reviewed on:</b> 04/08/15</td></tr> <tr><td><b>Updates:</b></td></tr> <tr><td><b>Recommendation:</b></td></tr> <tr><td><b>File 24 - Gardiner</b></td></tr> </table>	<b>Reviewed by:</b> JF	<b>Reviewed on:</b> 04/08/15	<b>Updates:</b>	<b>Recommendation:</b>	<b>File 24 - Gardiner</b>
	Aff.Sub.Wit.																																																																											
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<b>Recommendation:</b>																																																																												
<b>File 24 - Gardiner</b>																																																																												

Atty Kilgore, Joe Dee (Pro Per Petitioner)

Atty Kilgore, Rhett Steven (Pro Per Petitioner)

## Amended Petition to Determine Succession to Real Property

<b>DOD: 10-16-14</b>	<b>JOE DEE KILGORE and RHETT STEVEN KILGORE</b> are Petitioners.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	40 days since DOD	
	No other proceedings	
<b>Cont from 031015</b>		
<b>Aff.Sub.Wit.</b>	I&A: \$144,953.07 (real property located at 3704 W. Persimmon Lane)	
✓ <b>Verified</b>		
✓ <b>Inventory</b>	Decedent died intestate	
<b>PTC</b>		
<b>Not.Cred.</b>	Petitioners request Court determination that the decedent's 100% separate property interest in the real property passes to them one-half each.	
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
✓ <b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> skc
		<b>Reviewed on:</b> 4-8-15
		<b>Updates:</b>
		<b>Recommendation:</b> SUBMITTED
		<b>File</b> 25 - Kilgore

**Petition to Determine Succession to Real Property (Prob. C. 13151)**

<b>DOD: 5/11/14</b>		<p><b>MARINA REESE</b>, spouse, and <b>STEVEN ALLEN KLISE</b>, <b>NORMA DEPOYAN</b>, <b>HAZEL MARIE STEITZ</b> and <b>TIMOTHY JON KLISE</b>, siblings, are petitioners.</p> <p>40 days since DOD.</p> <p>No other proceedings.</p> <p>Decedent died intestate.</p> <p>I &amp; A                      -                      \$75,000.00</p> <p><b>Petitioners request</b> Court determination that Decedent's 100% interest in real property pass to <b>MARINA REESE</b> pursuant to intestate succession and assignments of interest.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. The siblings of the decedent have assigned their interest in this estate to the surviving spouse. There does not appear to be a provision in the Probate Code that would allow an individual to <b>assign</b> their interest in the estate in a summary proceeding.</li> <li>2. Attachment 14 lists Kenneth Edward Reese. It appears that Kenneth is another sibling of the decedent. Kenneth died on 6/7/1985. Petition does not indicate whether or not Kenneth was survived by issue. If Kenneth was survived by issue, his issue would also be entitled to a portion of the decedent's real property. Probate Code §6401.</li> </ol>	
<b>Cont. from</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>			W/
<input type="checkbox"/>	<b>Aff.Mail</b>			
<input type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>			
<input type="checkbox"/>	<b>Letters</b>			
<input type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			

**Reviewed by: KT**

**Reviewed on: 4/9/15**

**Updates:**

**Recommendation:**

**File 26 - Reese**

**27 Jose Guadalupe Gonzalez (Det Succ)**

Case No. 15CEPR00216

Atty Mascorro, Mary (Pro Per Petitioner)  
 Atty Romuar, Irma (Pro Per Petitioner)  
 Atty Gonzalez, Jose A. (Pro Per Petitioner)  
 Atty Gonzalez, Lupe (Pro Per Petitioner)  
 Atty Gonzalez, Andres (Pro Per Petitioner)  
 Atty Henderson, Juanita (Pro Per Petitioner)  
 Atty Gonzalez, Herbert (Pro Per Petitioner)  
 Atty Sugai, Vinnie (Pro Per Petitioner)  
 Atty Gonzalez, Jesse (Pro Per Petitioner)  
 Atty Gonzalez, Martin (Pro Per Petitioner)

**Petition to Determine Succession to Real Property (Prob. C. 13151)**

<b>DOD: 6/25/14</b>		<b>MARY MASCORRO, IRMA ROMUAR, JOSE A. GONZALEZ, LUPE GONZALEZ, ANDRES GONZALEZ, JUANITA HENDERSON, HERBERT GONZALEZ, VINNIE SUGAI, JESSE GONZALEZ, and MARTIN GONZALEZ</b> , all adult children of the decedent, are Petitioners.  40 days since DOD  No other proceedings  I&A: \$80,000.00 (Real property in Reedley, CA)  Decedent died intestate  Petitioners request Court determination that the decedent's 100% interest in certain real property in Reedley, CA, passes to them in 1/10 undivided interests each.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need date of death of the decedent's deceased spouse pursuant to Local Rule 7.1.1.D.  2. Need completed proposed Order (Form DE-315), including legal description of real property. Remember that a signature line for the judge should appear after any attachments (on the same page) pursuant to Local Rules 7.1.1.F. and 7.6.1.B.
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input checked="" type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>		
<input type="checkbox"/>	<b>Aff.Mail</b>		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b> <input checked="" type="checkbox"/>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
<b>Reviewed by:</b> skc			
<b>Reviewed on:</b> 4/9/15			
<b>Updates:</b>			
<b>Recommendation:</b>			
<b>File 27 - Gonzalez</b>			

**Status Hearing Re: Filing of the Eighteenth Account and Report of Trustees**

		<b>MICHAEL PAPPACODA</b> and <b>JOYCE THOMAS</b> are the current Trustees.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Seventeenth Account and Report was approved on 5/1/14.	
<b>Cont. from 032415</b>		Seventeenth account covered the period from 1/1/13 through 12/31/13.	<p><b>OFF CALENDAR.</b>  <b>Eighteenth Account filed and set for hearing on 6/3/15.</b></p> <p>1. Need Eighteenth Account or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Property on hand at the end of the Seventeenth account was \$184,000.55.	
<input checked="" type="checkbox"/>	<b>Verified</b>	Minute Order dated 5/1/14 set this status hearing for the filing of the 18 <sup>th</sup> account.	
<input type="checkbox"/>	<b>Inventory</b>	<b>Former Status Report filed on 3/19/15</b> states it is the practice of the Trustee to turn over the trust books and records to James Eberwein, CPA. Mr. Eberwein then prepares the trust income tax returns and the court accounting which serves as the basis for the preparation of the petition.	
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>	On 3/18/15 Mr. Knudson states he received the account and supplemental materials from Mr. Eberwein to enable preparation of the petition.	
<input type="checkbox"/>	<b>Notice of Hrg</b>		
<input type="checkbox"/>	<b>Aff.Mail</b>	Mr. Knudson and his staff are diligently working to complete the petition and account; however, it is unclear whether it will be completed, reviewed by the trustees and ready to be filed prior to the status hearing.	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>	It is respectfully requested that the court continue the status hearing for a period of two weeks or such time as the court deems appropriate.	
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202 Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by: KT</b>
			<b>Reviewed on: 4/9/15</b>
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 28 - Goering</b>

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

		See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. <u>As previously noted:</u> This minor is a ward of the Juvenile Delinquency Court. Therefore, this Probate Court does not have jurisdiction to grant a temporary or general guardianship for this minor. Petitioner may wish to pursue placement in the proper Court.  <u>If this petition goes forward, the following issues exist:</u>  2. Need Child Information Attachment (GC-210CA).  3. Need Notice of Hearing.  4. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) on: - Mother (Name not provided)  5. Notice to the minor's juvenile probation officer / County of Fresno may also be required.	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			
	Letters			X
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order	X		
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 4-9-15	
			Updates:	
			Recommendation:	
			File 29 - Byrd	

Atty Martinez, Rosalba (Pro Per – Maternal Grandmother)

Atty Martinez, Samuel (Pro Per – Maternal Step-Grandfather)

## Petition for Appointment of Temporary Guardian of the Person

See petition for details			NEEDS/PROBLEMS/COMMENTS:
			1. Need Notice of Hearing.
			2. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing pursuant to Probate Code §2250(e) on:
	Aff.Sub.Wit.		- Alvaro Gomez Martinez (Father)
✓	Verified		- Liliana Martinez Mendieta (Mother)
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 4/9/15
			Updates:
			Recommendation:
			File 30 - Gomez

Atty Horton, Lisa (for David W. Hicks – Petitioner – Son)  
 Atty Winter, Gary L. (for Derek R. Hicks – Competing Petitioner – Son)

Petition for Probate for Letters of Administration; Authorization to Administer Under  
 IAEA (Prob. C. 8002, 10450)

<b>DOD: 09/22/2012</b>		<b>DAVID W. HICKS</b> , son is petitioner and requests appointment as Administrator with bond set at \$142,000.00.  Full IAEA – o.k.  Decedent died intestate  Residence: Fresno Publication: The Business Journal  <u><b>Estimated value of the Estate:</b></u> Personal property - \$9,000.00 Real property - \$120,000.00 <b>Total - \$129,000.00</b>  Probate Referee: Steven Diebert	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note: Competing Petition filed 04/08/2015 by Derek R. Hicks is set for hearing on 05/19/2015.</b>  <b>Minute Order of 04/07/2015: Mr. Winter objects for the record and represents he will be filing a competing petition forthwith.</b>  <b>Note: If the petition is granted status hearings will be set as follows:</b>  • <b>Tuesday, 05/19/2015 at 9:00a.m. in Dept. 303</b> for the filing of the bond <u>and</u>  <b>Tuesday, 08/18/2015 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <u>and</u>  • <b>Tuesday, 06/21/2016 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.  Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.	
<b>Cont. from 040715</b>				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/
<input checked="" type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		<b>Reviewed by:</b> LV <b>Reviewed on:</b> 04/10/2015 <b>Updates:</b> <b>Recommendation:</b> <b>File 31 - Hicks</b>		



Eliana Villarreal

Atty Mendoza, Ofelia (Pro Per – Petitioner – Maternal Grandmother)

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Kayla Age: 7	Please see petition for details	NEEDS/PROBLEMS/COMMENTS:	
Carlos Age:			
Eliana Age: 2			
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.			<p>1. Need proof of personal service five (5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Temporary Guardian or consent and waiver of notice or declaration of due diligence for:</p> <ul style="list-style-type: none"> <li>Tara J. Villarreal (Mother)</li> </ul>
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail			
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv. <input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input checked="" type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
Reviewed by: LV			
Reviewed on: 04/10/2015			
Updates:			
Recommendation:			
File 32 – Ruiz & Villarreal			